



U. S. T R A D E   A N D   D E V E L O P M E N T   A G E N C Y

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Dear Sir or Madam:

**Re:     USTDA IQC for Reverse Trade Missions (RTMs), Conferences, Workshops, (RTMs),  
Training and Outreach Activities**

**Project: Title: Sub-Saharan Africa Regional: Light Aircraft and Helicopter Reverse Trade Mission (RTM). USTDA 2012-11007A /RFQ-IQ201211078**

As a Contractor under the USTDA Events IQC, your firm is being asked to submit a quote for the Sub-Saharan Africa Regional: Light Aircraft and Helicopter Reverse Trade Mission (RTM). Enclosed you shall find a Statement of Work, which includes all the background information USTDA has regarding the event and a Task Order Rate Chart format for submitting your price quotation.

Responses shall include appropriate staffing for this [RTM, Conference, Workshop, or Training] activity and the Direct Labor Cost according to the Task Order Rate Chart accepted by USTDA for your firm; appropriate Other Direct Costs; all fees; and estimates of airfares; subsistence costs for delegates; interpreter services (when necessary) and a completed Task Order Rate Chart with your quote. Please provide resumes for any technical or sector experts you propose. This applies to experts under subcontract to your firm and to employees.

In addition, you may provide any other information you would like USTDA to consider other than price, (such as suggested approach to this event, additional cities or site visits which may be greatly beneficial to the delegates, or any other aspect of the event, not specifically requested by USTDA) in determining your company's suitability for this particular assignment. It is cautioned that alternative approaches may not meet the Government's requirements and may cause the quotation to be evaluated less favorably. Careful attention to the requirements should assist in your determination of making innovative or alternative solutions. Multiple quotations *are not* allowed.

Submit quotes to the following:  
[contract@ustda.gov](mailto:contract@ustda.gov) *and* [tjohnson@ustda.gov](mailto:tjohnson@ustda.gov)

If you wish to submit your quote (no binders) by hardcopy; send to the following address:  
U.S. Trade and Development Agency  
1000 Wilson Boulevard, Suite 1600  
Arlington, VA 22209  
ATTENTION: Tyrone Johnson

This office should receive all responses no later than 12 noon on February 14, 2012, Washington, D.C. local/Eastern time.

All questions concerning this Request for a Task Order should be directed to [contracts@ustda.gov](mailto:contracts@ustda.gov) and [tjohnson@ustda.gov](mailto:tjohnson@ustda.gov) . The question cut off date is 12 p.m. on February 8, 2012, Washington, D.C. local/Eastern time.

Signed,

Tyrone Johnson  
Contracting Officer

Enclosures:

1. Request for a Task Order
2. Task Order Rate Chart

**Request for a Task Order**  
**U.S. Trade and Development Agency's IQC Pool for Reverse Trade Missions**  
**(RTMs), Conferences, Workshops, Training and Outreach Activities**

**1. PROJECT TITLE:**

**Project Title:** *Sub-Saharan Africa Regional: Light Aircraft and Helicopter Reverse Trade Mission*  
**USTDA Activity No.:** *2012-11007A*

**2. OBJECTIVE:**

USTDA seeks an IQC Contractor to organize and execute a Reverse Trade Mission Activity ("Activity"). This Reverse Trade Mission (RTM) would support U.S. companies seeking to provide light aircraft and helicopters to the sub-Saharan African market. The RTM would showcase U.S. technologies and services to up to 12 private or public sector representatives from sub-Saharan Africa. In addition, the RTM would include up to three self-funded delegates who would cover the costs of their own international and domestic airfare, hotel accommodations, visa fees, and other incidental expenses associated with the RTM, for a total of up to 15 delegates. The RTM would allow U.S. firms to highlight their products and services to potential buyers from sub-Saharan Africa's growing aviation market. The RTM would also support the objectives of the National Export Initiative (NEI) and advance USTDA's African Trade Lanes Partnership.

**3. BACKGROUND:**

Africa is the second fastest growing region of the world in terms of aviation, and was the only region in the world to experience strong commercial aviation growth in 2010. Africa's carriers moved 11% more people in 2010 than in 2008. This growth in demand has led to increased purchased of aircraft by the subcontinent's principle airlines, such as Kenya Airways and South African Airways. In addition to these major airlines, there is also burgeoning demand for light aircraft from the region's mid-sized aviation companies. Light aircraft, typically defined as an aircraft that has a maximum gross take-off weight of 12,500 lb or less, are routinely utilized in sub-Saharan Africa to provide transportation to tourists and residents, and to provide air ambulance and medical evacuation services.

In collaboration with the Commercial Service, the sub-Saharan Africa team has conducted significant research on the potential market for light aircraft in sub-

Saharan Africa. Tourism and general aviation operators, as well as flight schools, in East and Southern Africa are highly interested in procuring additional light aircraft and helicopters to improve their company's reliability and increase their capacity. The sub-Saharan Africa team has identified over 15 potential buyers of aircraft and/or helicopters in Eastern and Southern Africa. In addition, we have communicated directly with the three primary U.S light aircraft manufacturers – Cessna, Hawker Beechcraft, and Piper, as well as U.S. aircraft distributors, and U.S. companies involved in the legal and financial aspects of aircraft transactions. These firms indicated a strong interest in growing their sales to sub-Saharan Africa, and requested that USTDA support this RTM.

#### **4. STATEMENT OF WORK:**

The Contractor may exercise creativity and propose changes to this Statement of Work only for assumptions that are specifically noted in the text.

The Contractor shall arrange for, supply, and be reimbursed directly for actual expenses for 12 delegates' lodging, fully refundable economy class international and domestic air fare, land transportation, meals associated with the event for the actual number of USTDA-sponsored delegates involved in the Activity. In addition, the RTM would include up to three self-funded delegates who would cover the costs of their own international and domestic airfare, hotel accommodations, visa fees, and other incidental expenses associated with the RTM, for a total of up to 15 delegates.

Regarding meals associated with the event, these shall be provided by the Contractor. The Contractor shall arrange for sponsorship of delegate meals to the greatest extent practicable. In the absence of sponsorship, the Contractor shall arrange and pay for delegate meals, the cost of which shall be determined by using as a guide, the amounts designated for meals in the U.S. Government Meals and Incidental Expenses subsistence allowance schedule. If delegates elect not to partake of the meal provided, they are free to eat elsewhere at their own expense. Quotations/offers shall identify proposed meal arrangements in both the narrative and task order rate charts. The Contractor shall budget for meals for both regular and self-pay delegates (15 delegates total).

The Contractor shall manage the arrangements for visas in accordance with Section F of the Reverse Trade Mission (RTM) Manual. The Contractor's proposal shall include the cost of visas for the delegates as a reimbursable expense.

The Contractor shall accompany the delegation and assist in all reasonable requests to obtain any information (catalogues, brochures, annual reports, regulatory requirements, etc.) identified by the delegation. This may require follow-up mailings after the delegation has departed.

The Contractor shall prepare a quotation with the following assumptions and requirements in mind:

### **General Tasks:**

#### **Itinerary:**

The RTM would span approximately eight business days and would include a meetings with private sector representatives from the U.S. aviation sector, and relevant site visits. The visit dates are flexible and anticipated to be in spring or summer 2012.

The delegation would visit Wichita, Kansas, which is home to the headquarters of both Cessna and Hawker Beechcraft, as well as Vero Beach, FL, which is home to Piper Aircraft. The delegation would visit at least one additional U.S. city, which may include Fort Worth, TX (home to Bell Helicopter) or Stratford, CT (home to Sikorsky), or other relevant U.S. cities as identified by the selected IQC contractor.

#### **Identification of Delegates:**

USTDA, in coordination with relevant U.S. Embassies and U.S. companies will finalize identification of the delegates. The Contractor is welcome to make initial suggestions for delegates as well. Delegates are expected to be the heads of small-to-medium sized private sector aviation companies from throughout sub-Saharan Africa, and primarily from East and Southern Africa.

Once delegates have been selected, the Contractor shall prepare delegate invitation letters for USTDA review and approval.

The RTM delegation will include 12 regular delegates and up to 3 self-pay delegates (if an African company wishes to include more than one person on the USTDA RTM, they will be offered a self-pay slot on a first-come/first-serve basis). The Contractor should assume that the delegates would be coming from a variety of cities in sub-Saharan Africa, primarily from Kenya, Tanzania, Zambia, and other locations in Eastern and Southern Africa.

#### **Site Visits:**

Required visits include Cessna and Hawker Beechcraft in Wichita, Kansas, and Piper Airlines in Vero Beach, FL. The selected IQC contractor should recommend additional locations as appropriate, with consideration given to site visits related to civilian helicopters.

#### **Interpretation:**

All invited delegates will be required to be proficient in written and spoken English. No interpretation/translation should be required.

**Delegate Handbook:**

The Contractor shall prepare a Delegate Handbook that shall include, at a minimum, a complete and detailed itinerary; a meeting schedule; information related to site visits, sponsors, and USTDA; any "off the shelf" information on the relevant U.S. economic sector, and any relevant training materials. The Delegate Handbook shall also include a personalized welcome letter from USTDA for each delegate. The Contractor shall submit the draft Delegate Handbook to USTDA for approval at least three working days prior to the event. The Contractor shall provide a copy of the Delegate Handbook to each delegate and review its contents in a general orientation meeting prior to the start of the visit.

**Business Roundtable:**

A regular business briefing will not be required. However, the Contractor shall plan and execute a smaller, ½ day business roundtable. The roundtable will provide an opportunity for additional U.S. firms (particularly those other than Piper, Cessna, and Hawker Beechcraft) to meet with the delegation and learn about the delegates' procurement requirements.

**Location:**

The Contractor shall recommend and arrange an appropriate venue for the business roundtable.

**Recruitment and Gate Fees:**

A gate fee will not be required for the business roundtable.

**Preparation of Presentations:**

The delegates shall prepare very brief presentations for the roundtable. The Contractor shall collect any electronic delegate presentations/background materials in advance of the visit and ensure that they have been loaded onto a computer or CD-ROM, as appropriate, for viewing at the Business Roundtable. In advance of the Business Roundtable, the Contractor shall arrange for each delegate to practice their presentation and shall provide advice and feedback as necessary.

**Marketing:**

The Contractor shall develop a marketing strategy to market the Business Roundtable. The strategy should include a targeted marketing campaign which is sufficient to ensure the attendance of at least 12 firms. The marketing materials

shall be easily readable and accessible. The Contractor is encouraged to use telemarketing, fax broadcasting, trade websites and the internet.

The Contractor shall submit to USTDA its marketing strategy, including a timeline, for the Business Roundtable. Any materials, flyers, brochures, and other promotional items shall be cleared by USTDA prior to public distribution. Upon request, USTDA may make available the names of relevant companies and entities in the agency's mailing database.

**Briefing Book:**

The Contractor shall prepare a Briefing Book that includes, at a minimum, an agenda for the Business Roundtable; a list of delegates and their contact information; background materials on the specific project(s) and/or sector in the delegates' country, and other informational material specific to the Activity. The Contractor shall submit the draft Briefing Book to USTDA at least 5 working days prior to the event. The Contractor shall provide a sufficient number of books for the Business Roundtable attendees; any remaining copies shall be delivered to USTDA's library immediately after the event.

**Meals:**

The Contractor shall arrange and pay for food and coffee breaks for all Business Roundtable participants. At a minimum, the Contractor shall arrange to provide hors d'oeuvres and coffee break refreshments for the participants.

**Thank-you Letters:**

At the conclusion of the event, the Contractor shall prepare delegate and participant thank-you letters for USTDA review and approval. USTDA shall be responsible for sending out the delegate thank-you letters, and the Contractor shall be responsible for sending out (via electronic mail or post) the participant thank-you letters.

**Sponsorship / Participation:**

**All pledges of sponsorship are subject to USTDA approval. Contractors may propose sponsorship for any required reimbursable item in this Statement of Work; any sponsorship guarantees shall be identified in the Fixed Price portion of an Offeror's Task Order Rate Chart.**

Any funds collected for sponsorships that exceed the amount required in this SOW shall be split 50-50 between USTDA and the Contractor. If the Contractor is unable to arrange for at least \$3000 in sponsorship from entities approved by USTDA, the Contractor shall be responsible for the difference, which will be subtracted from the Fixed Price portion of the contract. The Contractor shall

accurately account for the amount of sponsorship obtained and provide such accounting to USTDA prior to the submission of the Immediate Report.

The Contractor is advised that participation at and/or sponsorship of an event held in the United States is limited to U.S. Individuals, U.S. Firms or U.S. Consultants, each as defined in USTDA's Nationality, Source and Origin Requirements ("Nationality Requirements"), in addition to invited delegates from USTDA eligible countries. USTDA's Nationality Requirements are available on USTDA's website at [www.ustda.gov](http://www.ustda.gov). **All marketing and promotional materials for USTDA events held in the United States shall contain the limitations set forth above**, and shall include the web link to USTDA's Nationality Requirements. The Contractor is also advised that individuals or organizations that are included in the U.S. Government's Excluded Parties List System ([www.epls.gov](http://www.epls.gov)) may not attend or sponsor USTDA events.

The Contractor *is not* required to contact any foreign officials or U.S. officials during the quotation preparation process.

A pre-award conference will not be convened by USTDA

USTDA is not providing any background materials.

## **5. REPORTS:**

### **a. PRESENTATION AND STYLE**

All reports for RTMs, conferences and other USTDA-sponsored events with similar reporting requirements, shall be delivered to USTDA and shall be grammatically correct. The reports shall include on the cover: USTDA's logo; attribution of USTDA as the funding source; USTDA's mailing address; and USTDA's mission statement as provided by the Agency.

### **b. THE "IMMEDIATE REPORT"**

Forty-five days following the conclusion of the RTM, conference or other USTDA-sponsored event, the Contractor shall provide a written initial report to USTDA covering the event. This report will be referred to as the "Immediate Report." The Immediate Report will be divided into two separately bound volumes. The first volume shall contain basic information that thoroughly describes the USTDA-funded event. It must be suitable for public distribution and contain sufficient descriptions of all speeches, panels and other presentations to provide an accurate accounting of the event for public record.

Volume 1 of the Immediate Report (the "Public Version") shall give a full report of the RTM, conference or other USTDA-sponsored event, including the final

itinerary, a list of the meetings held and other significant activities on the agenda, and a list of foreign participants as well as participants from U.S. companies and other entities (including U.S. Government, universities, not for profit organizations, etc.). The Contractor shall include a narrative (exclusive of commercially sensitive information) containing the Contractor's evaluation on whether the event achieved USTDA objectives.

## **PARTICIPANTS LIST**

The Contractor shall compile separate participants' lists of U.S. and foreign participants. For the lists of participants, whether foreign or U.S., the Contractor shall include the full name, title, employment designation, mailing address, including city/state/zip, telephone number, , e-mail and the date and site where the individual participated in the RTM in the format set forth below. The Contractor shall deliver this information in both hard copy form and on electronic media (CD-ROM or flash drive).

The format provided below shall be used for the participants' lists in the Immediate Report for each contact, both U.S. and foreign. In addition, when sending the Immediate Report, an electronic version of the U.S. participant list shall also be sent to [participantlist@ustda.gov](mailto:participantlist@ustda.gov) in an Excel spreadsheet, using the format below. Each listed category must have its own distinct field, separated into columns:

1. Firm/Organization
2. Contact Person (First Name)
3. Contact Person (Last Name)
4. Contact Person (Title)
5. Employment Designation
6. Address 1
7. Address 2
8. City
9. State
10. Zip
11. Country
12. Phone Number
13. E-mail Address
14. Date of Participation (mm/dd/yy)
15. Site of Participation
16. Opt-in for USTDA emails

For all foreign participants, the Contractor shall also collect employment designations for inclusion in the Immediate Report. (Example: 5 government representatives, 1 medical professional and 10 private business professionals for a



total of 16 participants) Select the employment designations from the following list.

- Agricultural Professionals
- Government Representatives
- Important Political Figures Not Properly Classified Elsewhere
- International Organization Representatives
- Labor Professionals
- Media/Communications Professionals
- Medical Professionals
- Non-Governmental Organization Professionals
- Other
- Private Business Professionals
- Researchers/Faculty (affiliated with academic institutions)
- Researchers (non-academic)
- Scientists/Technologists
- University Administrators/Instructors
- University Graduate Students
- University Undergraduate Students
- Unknown

Contractors are reminded to inform participants that by registering for each event, their contact information will be provided to USTDA and USTDA, to the extent permitted by law, may make such information available to other interested persons upon request. In addition, participants should be informed that they will likely receive requests for information via telephone, mail, email or fax from USTDA program evaluators, and other USTDA representatives. Contractors should also refer participants to USTDA's privacy policy at [www.ustda.gov](http://www.ustda.gov).

## **CONFIDENTIAL ANNEX**

Volume 2 of the Immediate Report is a confidential annex. It is the responsibility of the Contractor to clearly mark the annex with the word "Confidential" on the cover and in the header of all pages of the Report.

Volume 2 shall display information received from U.S. and foreign participants that is relevant for understanding whether the activity assisted the achievement of USTDA objectives. These objectives may include: U.S. commercial benefits, host country development benefits, and policy or economic reform objectives as set forth in the individual Task Order. This information shall be based on discussions, questionnaires or telephone, fax or email surveys with the foreign and U.S. participants. For example, the U.S. participants should be asked to project their firm's business potential in the Country of Delegation over the next 1-3 years. In the case of policy objectives, foreign participants (and some U.S. participants) should be asked whether progress towards the desired objective was facilitated by the USTDA-funded activity. USTDA believes that this information is necessary to establish a "baseline" that will be helpful in guiding future follow-

up evaluation work. The Contractor shall endeavor to obtain the maximum amount of information possible from the U.S. firms. The information shall be firm or entity specific (as in the case of a government entity, NGO, etc.) and presented individually for each entity. Contact information for the individuals providing the information shall be included. Participants who failed to respond should be identified to assist future evaluation efforts.

The annex shall contain an executive summary and a descriptive narrative as to whether the event achieved USTDA objectives. In this narrative, the Contractor shall identify the most productive prospective commercial relationships that were assisted by the USTDA event. USTDA will add this narrative to the Agency's project database.

USTDA will maintain the confidentiality of such information in accordance with the applicable law. Contractors shall take special care to highlight any information that is particularly sensitive.

For the Immediate Report, USTDA generally requires the following level of work effort: at least two emails/faxes shall be sent to all participants (foreign and U.S.). For U.S. participants who had significant interaction with the foreign visitors (in the form of site meetings, private meetings or social events, and one-on-one meetings at conferences/business briefings), USTDA requires the Contractor to make at least two telephone calls to participants who fail to respond to email and fax. For the Immediate Report, a completed questionnaire response at the conclusion of the event, Contractor's debriefing of foreign participants and U.S. company participants, and Contractor's participation in meetings between foreign guests and the U.S. companies may be substituted for post-event surveys.

The Immediate Report shall be submitted in draft to USTDA within 45 days after the conclusion of the RTM, conference, or other USTDA-sponsored event. The Contractor shall incorporate USTDA's comments as appropriate and shall submit the Final Immediate Report within 15 days of receiving USTDA's comments.

## **PHOTOGRAPHS**

**Within two weeks of the conclusion of the RTM**, the Contractor shall provide photographs of the event, suitable for publication to USTDA. Please remember to disengage the date and time stamps before taking the photographs. CD ROMs or flash drives shall be clearly labeled with the name and date(s) of the event and the activity number. They shall also include the Contractor's name and contact information for any questions about the photographs. CD ROMs or flash drives shall be sent with a delegate list (including titles and affiliations), and contact sheets (preferred) or hard copy photos.

The Contractor shall identify key photographs and provide descriptive/identifying information associated with them. In selecting which photographs are important, the Contractor shall consider those that best represent the event. The descriptive/identifying information shall be provided in a separate Word file that contains the photograph file name, followed by the descriptive/identifying information. In identifying persons in photographs, the Contractor shall include the names, affiliations and titles.

Photographs taken during RTMs should be high resolution shots, whenever possible, and shall include both posed and interactive pictures. If site visits or plant tours are included as part of the delegates' itinerary, the Contractor shall seek photographs of delegates interacting with each other, with U.S. experts, and participating in equipment, and/or technology demonstrations, as well as photographs with or without people that show typical technology or equipment seen during the visit. In particular, USTDA is also interested in photographs without people that show typical technology or equipment in the covered sector.

As a standard, USTDA requires that all digital images be taken with resolution, no less than 300 pixels per inch (dpi), so that they can be used in USTDA's printed materials. Preferred sizes are 3 X 5 (900 x 1500 pixels) or 4x 6 (1200 x 1800 pixels) or larger. For optimal results, please adjust digital camera settings to the best quality resolution. **These photographs shall be sent to the attention of the USTDA Public Affairs Specialist.**

The Contractor shall provide one or more photographs to the delegation as a souvenir record of the Activity. Copies of the **Immediate Report** shall include relevant photographs taken during the Activity.

#### **c. THE "FINAL/FOLLOW-ON" REPORT**

The Contractor shall provide a written Final/Follow-On Report 12 to 14 months following the conclusion of the RTM, conference, or other USTDA-sponsored event. The Final Report shall be deemed confidential and shall not be deemed suitable for public distribution. It is the responsibility of the Contractor to clearly mark the Final Report with the word "Confidential" on the cover and the header on all pages of the Final/Follow-On Report. The Contractor shall contact foreign and U.S. participants in the RTM or conference to determine what business, policy, and/or developmental impact resulted (or is underway) as a result of the RTM, conference, or other USTDA-sponsored event. Specifically, the participant should be reminded of their responses captured in the Immediate Report (the "baseline") and asked to comment on whether those projections came to pass; if not, why not; and whether any potential business/policy development related to the RTM, conference or other USTDA-sponsored event is still possible. The

Contractor shall endeavor to obtain the maximum amount of information possible from the participants. The Final/Follow-On Report shall follow the same format and instructions described above for the Immediate Report.

The Final/Follow-On Report shall also contain a narrative presenting the Contractor's final overall evaluation as to whether the USTDA-funded event achieved USTDA goals or not.

For the Final/Follow-On Report, USTDA requires the following work effort. At least two e-mails/faxes should be sent to all participants (foreign and U.S.). For U.S. participants that had significant interaction with the foreign visitors (in the form of site meetings, private meetings or social events, one on one meetings at conferences/business briefings), USTDA requires the Contractor to make at least two telephone calls to participants who fail to respond to fax or email.

The Final/Follow-On report shall also contain participants' lists (foreign and U.S.) as well as the agenda for the RTM/conference. USTDA recommends that the Final/Follow-On Report be organized in the following way:

- 1) Contractor's overall evaluation (Narrative 1-2 pages);
- 2) List of foreign participants;
- 3) List of U.S. participants with contact information - phone number(s) and e-mail(s);
- 4) Firm-by-firm and delegate-by-delegate descriptions of the results of the RTM. conference, or other USTDA-sponsored event; and
- 5) List of entities/participants that did not respond to the Contractor.

For each participant list, the format used for the Immediate Report shall be utilized.

USTDA also welcomes any recommendations that the Contractor may have for follow-up actions that meet USTDA criteria and goals. USTDA will maintain the confidentiality of such information in accordance with applicable law.

The Contractor shall incorporate USTDA's comments as appropriate and shall submit the Final/Follow-On Report within 15 days of receiving USTDA's comments.

**d. ELECTRONIC TRANSMITTAL OF THE IMMEDIATE AND FINAL/FOLLOW-ON REPORTS**

Two central email accounts have been established to receive all draft IQC reports for both the Immediate Report and the Final/Follow-On Report. The email addresses are:

iqcimmediatereports@ustda.gov  
iqcfinalreports@ustda.gov

The IRC Manager will advise the Contractor regarding the status of the report-- approved or requires revisions. Once USTDA approves the report, the Contractor may submit the final version of the report and the invoice.

Contractors shall submit two hard copies of the Immediate and Final/Follow-On Report and one electronic copy on an approved electronic media through the USTDA mailroom. Each Report shall be submitted in one electronic file. If the Report contains multiple volumes, each volume shall be a separate electronic file. If a Confidential volume is included, please identify as such in the file name. The proper invoice may be submitted at this time. All shall be sent to:

U.S. Trade and Development Agency  
1000 Wilson Boulevard  
Suite 1600  
Arlington, VA 22209  
703-875-4357

**6. TECHNICAL DIRECTIONS:**

Technical Directions will be outlined in the Contracting Officer's Representative (COR) Appointment Letter. The Contracting Officer will also provide notification of any COR change.

**7. TERM OF PERFORMANCE:**

The effective date of this task order is \_\_\_\_\_, and the estimated completion date is \_\_\_\_\_. *[both blanks to be completed by Contracts]*

**8. CEILING PRICE AND TERMS:**

The Government estimate for this requirement is \$ 215,000. The Government estimate is not binding and is for guidance purposes only. Quotes exceeding the Government estimate will be evaluated. In no event may the total amount of a Task Order exceed the \$2,000,000 ceiling price. Estimates for reimbursed items should be made carefully with this limitation in mind. The prices to the Government shall be those charged to your most favorable customer or better.

The fixed price portion of this Task Order includes all salaries and other personnel costs and all indirect costs and profit (as set forth in the multiplier).

The costs of all supporting documentation preparation, reproduction, and distribution are also included in the fixed price.

The Contractor will be reimbursed directly for reimbursable items listed in the budget, which generally include actual expenses for the delegates' lodging, economy class international and domestic air fare, land transportation, meals associated with the event for the actual number of USTDA-sponsored delegates involved in the Activity, and interpretation services (when needed).

(Please refer to the U.S. Government Meals and Incidental Expenses (M&IE) for guidance for subsistence allowances in preparing your costs for Task Orders).

### Payment Terms

When the first Task Order for a particular Contractor is issued under this IQC, the amount obligated for the minimum guarantee of \$5,000, shall be subtracted from the total Task Order amount by USTDA for the first order. This paragraph applies only to the base year and shall not apply to any option periods.

All IQC Contractors shall submit receipts for all reimbursable expenses before payment will be authorized. For auditing purposes, copies of receipts and other documentation shall be maintained for a period of three years.

A) USTDA will make partial payments against the **fixed price** portion of the Task Order. Invoices may be submitted using the following schedule and percentages:

- 30% upon agreement between USTDA and the Contractor on the schedule for performance of the Task Order;
- 20% after USTDA approval of a draft itinerary or agenda;
- 35% after conclusion of the event, and submission to and approval by USTDA of the Immediate Report and related deliverables; and
- 15% after completion and USTDA approval of the Final Report.

B) Contractors will invoice USTDA for the reimbursable costs under a Task Order in accordance with the following schedule:

- When expenses for a cost reimbursable item are incurred; and
- At the conclusion of the activity, after a final accounting of all expenditures is completed and accepted by the USTDA COR.

C) Payment will be made upon presentation and acceptance by USTDA of a proper invoice, as set forth in the Contract clauses entitled "Allowable Cost and Payment" (FAR 52.216-7) and "Payment" (FAR 52.232-1), as applicable.

**9. KEY PERSONNEL:**

For each employee or consultant who will be performing services under the Task Order, please submit the following information:

Name

Full Address

Telephone Number

Place of Birth

Citizenship

Education, including name and location of institution, major course of study,

Degree and date conferred

Language proficiency, reading and speaking

Last three (3) years of employment and annual salary

Last three (3) years of specific, relevant consultant services performed, contact

Information for employer and daily rate

The individual's professional earnings for the past three years shall support the salary proposed for the employee, and shall be within the specialty range submitted by the Contractor with its quote and accepted by USTDA.

The individuals listed are considered key personnel for the performance of this Task Order. They are considered essential to the successful performance of the work. The Contractor shall make no substitution or diversion of these personnel without the prior written consent of the Contracting Officer.

**10. USE OF GOVERNMENT FACILITIES AND PERSONNEL:**

The Contractor, and its employees or consultants are prohibited from using U.S. Government facilities (such as office space or equipment), or U.S. Government clerical or technical personnel in the performance of the services specified in the Task Order, unless permission is authorized in advance, in writing, by the Contracting Officer.

**11. PLACE OF PERFORMANCE:**

The Place of performance for this Task order is the United States of America.

**12. ACCESS TO CLASSIFIED INFORMATION:**

The Contractor will not have access to classified information.

**13. LOGISTICAL SUPPORT:**

USTDA and other U.S. government partners are not obliged to provide any logistical support.

**14. SOURCE SELECTION AND EVALUATION FACTORS:**

a. General

- (1) This task order request is issued as per FAR Subpart 16.505 Ordering. A trade-off process, as described at FAR 15.101-1, will be used in making the source selection. Award will be made to the Contractor whose quotation represents best overall value to the Government, considering all the evaluation factors. Contractors are advised that award will not necessarily be made to the Contractor submitting the quote with the lowest evaluated price. All technical evaluation, staff experience and past performance factors combined are significantly more important than cost or price.
- (2) The contract award will be based on the evaluation of 6 factors:
  - (a) Quality of proposed itinerary and/or event agenda
  - (b) Quality and appropriateness of Contractor and subcontractor staff
  - (c) Proposed budget and allocation of resources / staff time
  - (d) Past performance / previous experience in relevant sector and country
  - (e) Proposed marketing plan
  - (f) Proposed lodging, conference facilities, and other logistics arrangements
- (3) The Government may award based on initial quotations received, without further discussions. Accordingly, each Contractor should submit their quotation to the Government using the most favorable terms from a cost/price and technical standpoint.
- (4) Only one award will result from this task order request. Quotations that do not address all requirements presented in the statement of work may not be considered for award.

b. Relative Order of Evaluation Factors

The Cost Factor is less important than the combined importance of the following evaluation factors, in order of most important to least important:



- (a) Quality of proposed itinerary and/or event agenda
- (b) Quality and appropriateness of Contractor and subcontractor staff
- (c) Proposed budget and allocation of resources / staff time
- (d) Past performance / previous experience in relevant sector and country
- (e) Proposed marketing plan
- (f) Proposed lodging, conference facilities, and other logistics arrangements

As technical merit of the quotes becomes more equal, cost may become a determining factor.

## **15. USTDA NATIONALITY REQUIREMENTS:**

The purpose of USTDA's nationality, source, and origin requirements is to assure the maximum practicable participation of American Contractors, technology, equipment, and materials in the implementation of IQC activities.

For work performed under this Task Order in the United States, the following provisions shall govern the delivery of goods and services funded by USTDA under this Task Order: (a) the Contractor must be either a U.S. firm or U.S. individual; (b) employees of U.S. Contractor or U.S. subcontractor firms responsible for professional services shall be U.S. citizens or non-U.S. citizens lawfully admitted for permanent residence in the United States; (c) goods purchased for implementation of the Task Order and associated delivery services (e.g., international transportation and insurance) must have their nationality, source and origin in the United States; and (d) goods and services incidental to Task Order support (e.g., lodging, food, and transportation) in the country of origin are not subject to the above restrictions.

For work performed under this Task Order outside of the United States, the following provisions shall govern the delivery of goods and services funded by USTDA under this Task Order: (a) the Contractor must be either a U.S. firm or U.S. individual; (b) the Contractor may use subcontractors from the host country (or from any USTDA-eligible country participating in a regional activity) in an amount not to exceed twenty percent (20%) of the USTDA Task Order amount and only for specific services from the Statement of Work identified in the subcontract; (c) employees of U.S. Contractor or U.S. subcontractor firms responsible for professional services shall be U.S. citizens or non-U.S. citizens lawfully admitted for permanent residence in the United States; (d) goods purchased for implementation of the Task Order and associated delivery services (e.g., international transportation and insurance) must have their nationality, source and origin in the United States; and (e) goods and services incidental to Task

Order support (e.g., lodging, food, and transportation) in the host country are not subject to the above restrictions.

### Definitions

A “U.S. individual” is (a) a U.S. citizen, or (b) a non-U.S. citizen lawfully admitted for permanent residence in the United States (a green card holder).

A “U.S. firm” is a privately owned firm which is incorporated in the United States, with its principal place of business in the United States, and which is either (a) more than 50% owned by U.S. individuals, or (b) has been incorporated in the United States for the last three (3) year period; employs U.S. citizens in more than half of its permanent full-time positions in the United States; and has the existing capability in the United States to perform the work in question.

A partnership, organized in the United States with its principal place of business in the United States, may also qualify as a “U.S. firm,” as would a joint venture organized or incorporated in the United States consisting entirely of U.S. firms and/or U.S. individuals.

A nonprofit organization, such as an educational institution, foundation, or association may also qualify as a “U.S. firm” if it is incorporated in the United States and managed by a governing body, a majority of whose members are U.S. individuals.